

Mentor

(Mentor name) complies with all requirements stated in 13-CFR-124.520(b) *Mentors*.

The mentor is (select one: “a graduated 8(a) concern”; “a transitional stage 8(a) participant”; “an “other” type of small business”; or “a large business”)

A. The mentor demonstrates that it:

1. *Possesses favorable financial health, including profitability for at least the last **two years**, as evidenced by the attached Federal Tax Returns and CPA Financial Statements for the required time period. See Exhibit A.*
2. *Possesses good character, as required in 13-CFR-124.108(a). **Also, provide two (2) professional Letters of Reference. See Exhibit B.***
3. *Does not appear on the federal list of debarred or suspended contractors, as evidenced by the attached **SBA Form 1623, Certification Regarding Debarment, Suspension, and Other Responsibility Matters. See Exhibit C.***
4. *Can impart value to a protégé firm due to lessons learned and practical experience gained because of the 8(a) BD program (*if applicable*), or through its general knowledge of government contracting, as evidenced by the attached statement, entitled **Value To The Protégé. Also, provide business’ capability statement. See Exhibit D.***
5. *Is not currently mentoring another 8(a) protégé.*

B. Mentor has provided required documentation including:

1. *A narrative of any on-going business relationship of the Mentor with other participants or small businesses. See Exhibit E.*
2. *A signed IRS form 4506 (Request for Copy or Transcript of Tax Return) – authorizing verification of the tax returns provided. See Exhibit F.*
3. *SBA Form 912 – completed by Mentor. See Exhibit G.*
4. *SBA Form 413 – completed by Mentor. See Exhibit H.*

Protégé

(Protégé's name) complies with all requirements stated in 13-CFR-124.520(c) *Protégés*

The protégé states that it:

1. Was approved for the 8(a) program on (month/day/year) and is in year (number) of the Developmental Stage.
2. ____ Has never received an 8(a) contract; or ____ is half the size standard corresponding to its primary NAICS Code of (number).
3. Is an 8(a) Participant in good standing in the 8(a) BD program, as evidenced by the attached most recent 8(a) Annual Update Approval Letter from SBA's Santa Ana District Office. **See Exhibit I.**
4. Is not currently a protégé to any mentor approved by SBA.
5. Has entered into a written agreement with the proposed mentor as required by 13-CFR-124.520(e) *Written Agreement*, as evidenced by the attached SBA Mentor/Protégé Agreement. **See Exhibit J.**
6. Has provided a narrative of any prior affiliation or relationship between Protégé and Mentor taking into account the existence of familial relationship, previous employment relationship, economic dependence, common management, and similar factors. **See Exhibit K.**
7. Has completed SBA Form 413 **See Exhibit L.**